CalAgenda

Introduction to CorporateTime 5.x

CAL People and Computer Training
University of California, Berkeley

For more information about the CAL PACT program, to sign up for classes, or to download class documentation, please visit our website at: **http://calpact.berkeley.edu/**

Use this space for notes

Introduction

This **CalAgenda** course has been created for CAL PACT participants to learn more about the features of the CorporateTime scheduling software. The course covers introductory-level material that applies to both the Windows and Macintosh computer platforms. This document serves as a future reference for you as you continue to gain experience on your own. Some topics may not be covered in as much detail during class as they are in this document. Documentation for previous versions of CalAgenda/CorporateTime, as well as for other courses, is available on the CAL PACT website: **http://calpact.berkeley.edu**.

Skills you need for this class

- How to use the mouse
- Familiarity with the Windows or Mac operating systems

Skills and concepts you will learn in this class

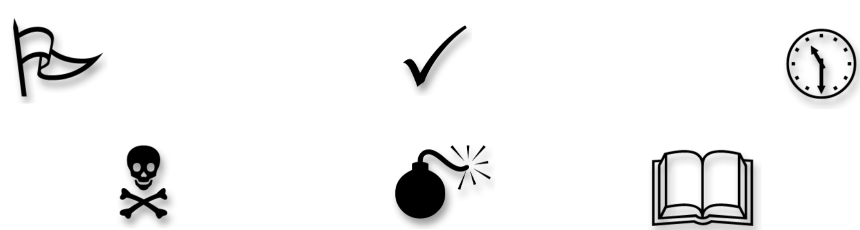
- Accessing your account
- Changing user information and passwords
- Searching for users, resources, or groups
- Working and scheduling events, notes, and tasks
- Creating and managing groups
- Setting access rights and user preferences
- Accessing your schedule via the web

Conventions used in this document

Menus and menu commands are separated by a vertical bar (**|**). In the document they will appear as **Menu|Command**. An example of this is: “Select **File|New...**.”

Icons in the left margin

Occasionally, you will notice icons in the left margin. Their purpose is to highlight important information. Examples:



Tip

To quickly log into your account, choose the “Enable Automatic Sign-in” option in the Connection Manager diaglog box.

Caution

To avoid losing your display settings, be sure to go to the menu bar and logout from the file menu.

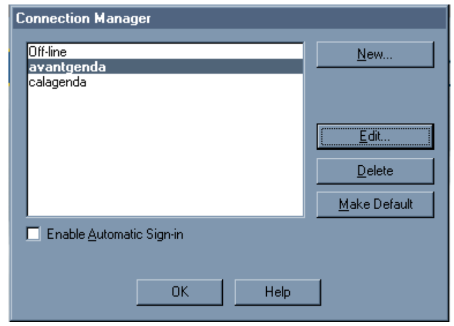
Note

What is this program called? CalAgenda? Or Corporate Time? The software used is called CorporateTime, but the service on campus is called CalAgenda, so you may hear these two terms interchangeably.

Starting Up and Signing On

Upon opening CorporateTime, the dialog box shown at the right will appear. In the upper field, choose which server you wish to connect with or choose the **Off-line** option if a network connection is not available. If no server is listed, click the **Other** button.

You will see the dialog box at the right appear on your screen. To create a new server, click on the **New** button and fill in the appropriate information. If you wish to make **calagenda** your default server, highlight **calagenda** and click on the **Make Default** button.



In the **CorporateTime** window, a graphical indicator in the status bar is also available to show current program status.

 This indicates that the program is running off-line.

 This indicates that the program is running on-line.

 This indicates that there are new entries in the In-tray.

Signing on as a resource

When signing on as a resource, you have the ability to change the access rights and password.

Changing User Information and Passwords

To view the user information that is available for others to see, select **Option|User Information**. To change the password, select **Options|Change Password**. The User Information is secured so that changes cannot be made, but if you need changes made to this information, contact your CalAgenda administrator. When changing the password, it must be changed twice, once for the server and once for the Off-line option. Log in to the server and change the password. Exit the program, log in once more using the off-line option and change the password again. If this is not done, CorporateTime will ask for *both* passwords.

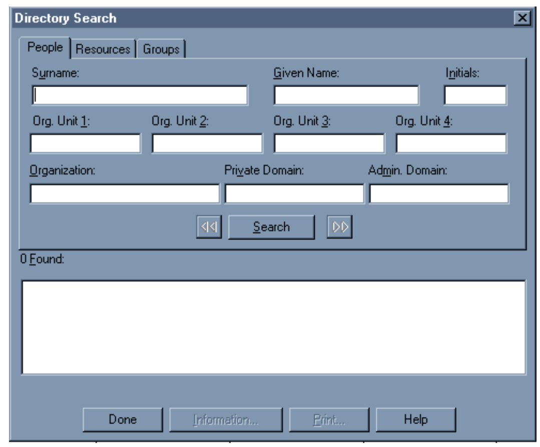
Accessing Help

CorporateTime contains context sensitive help which can be accessed at anytime by pressing the F1 key on the keyboard or by clicking the question mark (?) if it is available. The help screen will display information pertaining to the selected area on screen or the active dialog box. The general help screen can be accessed through the **Help** menu. The help screens operate exactly as they do in other programs.

Searching

Searching for users, resources, and groups is one of the most important tools in CorporateTime. After all, it's impossible to schedule an appointment unless you can find who to schedule with. The search screen can be accessed with the search button ( ) in specified dialog boxes or by selecting **Directory|Search Directory...** at any time. Accessing the Directory Search is useful for finding information on a person or resource, but it does not allow for adding the results to a list. When the search is accessed with the search button, the search results can be added to a list.

Single User Searches



Single user searches are accessed when only one person, resource, or group can be used. The dialog box contains three window tabs with the search topics. Enter the search criteria in the field and click the Search button to perform the search. The full information for each field is not necessary. Entering partial information will return all results that match the criteria. The search results are displayed in the lower portion of the window. The window will only display 100 results, with a scroll bar. To narrow the search, enter more criteria and click the search button again. Print the results by clicking on the Print button on the lower portion of the window. To view the specific information on a result, highlight the result and click the Information button. Once the desired resource is found, highlight the result and click **OK** to add it.

Searching for resources operates with the same functionality. In the Resources tab, there is one special checkbox option labeled "Local Resources only." With this option checked, the search will be limited to resources contained on the local server only.

Multiple User Searches

Multiple user searches are accessed through the search button when multiple people or resources can be used. The functionality of the search tabs operate the same, but there is a difference in the results list. The search results are displayed on the bottom left of the screen. To add search results, begin by selecting the desired result(s). The keyboard modifier Shift can be used to highlight multiple consecutive results and the keyboard modifier Control can be used to highlight multiple nonconsecutive results. Once the desired results have been selected, click the **Add** button to move the results to the right hand portion. Use the **Add all** button to add the entire list of search results. To remove names that have been added, select the name(s) and click the **Remove** button.

Tip

To save time in future searches for items, select each option in the first two columns.

Tip

For Macintosh users:

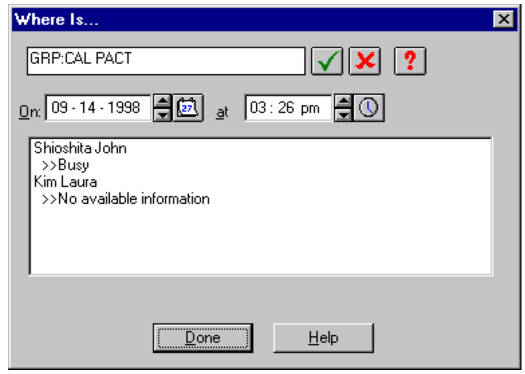
When adding individual people to searches or meeting proposals, don't hit return after you type their name. This will simulate clicking 'OK' and will finish your task.

Instead, hit Command + Return or click the green checkmark button.

Directory Searches

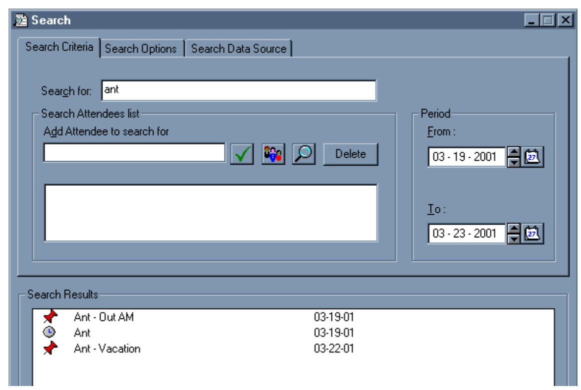
The directory search is accessed whenever the **Directory|Search Directory...** command is selected. The functionality of the directory search operates the same as the single user search, but you are not allowed to add the search results to any list. This feature is used mainly to locate information on people, resources, or groups.

Locating a Person...



In the **Directory** menu, a special command **Locate a Person...** is available to search for the activity of a person, resource, or group at a specific time and date. In the window that appears, enter the search parameters and click on the green check. Notice that a tab for resources or groups is not available. To search for a resource, precede the search string with **r:**, **re:**, or **res:**. To search for a group, precede the search string with **g:**, **gr:**, or **grp:**.

Searching Your Agenda



To find specific items located in your agenda, select **Edit|Search Agenda.** Under the **Search Options** tab, you can set where the program will search for your item. In the search field, type the item you wish to find, then click the search button. Next, select the period of time you wish to search. Note that the period will automatically default to your current view settings (day, week, or month). If you wish to search for a specific person who will be attending an event, type their name under "Search Attendees List." When you are done, click the search button.

Choosing Dates

In many of the available windows, a date control bar will appear to specify or change dates. The single arrows will move the current date backwards or forward by one single increment. The increment depends on the current view in CorporateTime. For example, when viewing a single day, it will move one day; when viewing a month, it will move one month. The double headed arrows are used to move by larger increments. Once again, this depends on the view. When viewing one day, it will move one week; when viewing a month, it will move six months.

To choose specific dates, click the calendar button and a small window will open. The pull down menus available at the top will control the month and year. The arrows have the same functionality -- the single arrows will move the month; the double arrows will move the year. Once the month and year have been selected, select a day from the small calendar view below. CorporateTime will not recognize any changes unless a day has been selected in the calender area. To make things easy, clicking on the **Today** button will automatically select the current date.

Working with the Agenda

Opening an Agenda

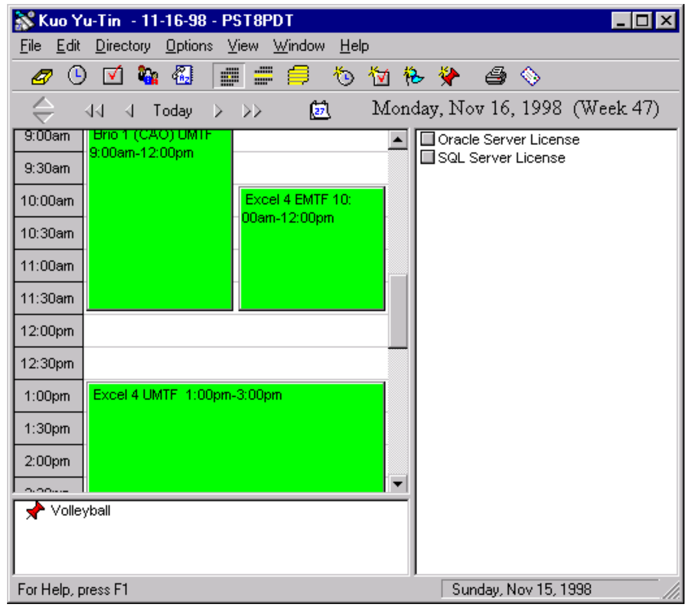
To open an agenda, go to the **File** menu and select the **Agenda** option. Then select one of the following three options:

- **Open** - This option will allow for opening an individual agenda. In the dialog box that appears, select the option to modify your own agenda or enter the name of the agenda to view. Notice that the search button is available to search for an individual or resource. If a resource agenda is desired, precede the name with one of the following - **r:**, **re:**, or **res:**. The last option available to modify the agenda as a designate is a special option which allows you to make changes to another person's agenda. The owner of the agenda must give you proper permission in order for you to be a designate. This will most likely be a function used by those on campus who have designates that maintain their schedule or coordinate calendars for managers.
- **Open As Designate** - This option is used to open group or resource agendas as a designate. As previously discussed, the proper permissions must be granted in order for the designate to make changes.
- **Open Group View** - This option is used to create or modify a group containing multiple people or resources. This allows a combined view of the agendas at the same time, thus making scheduling easier.

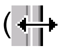
Changing the View

There are three possible ways to view a CorporateTime agenda. These are broken down into day view, week view, and month view. To switch between the views, use the toolbar buttons ( ).

The Day View



A sample of the day view is shown at right. The window is divided into three separate panes - the agenda, current tasks, and notes. Icons and colors within each pane are used to signify individual elements for each entry.

Each pane can be resized by clicking and dragging the border line between panes. The mouse cursor will change to double headed arrows ().

The interval and size of the time blocks of the agenda can be resized to suit the preferences of any user. Make the height of each time block smaller or larger by selecting **View|Decrease Row Height** or **Increase Row Height**. This does not change the interval of each time block, just the size. To change the time interval, select **View|Decrease Time Slot** or **Increase Time Slot**. Each time block can be changed to represent a time interval between five minutes and one hour.

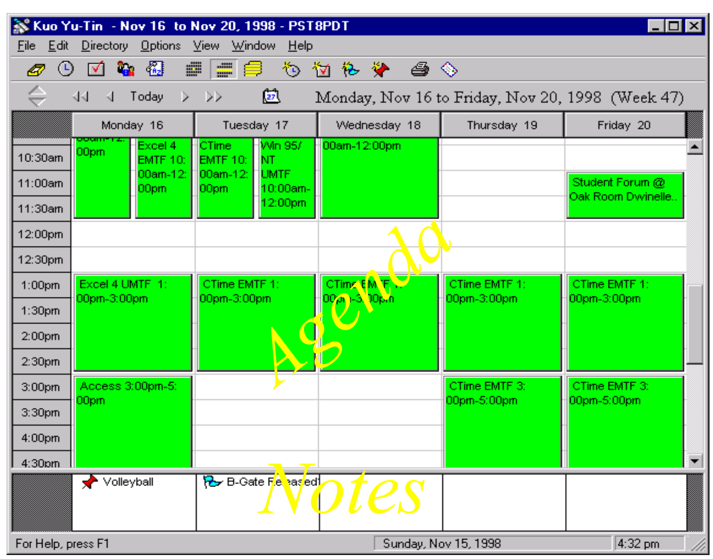
The Week View

The week view will display between five to seven days in the agenda depending on the set user preferences. The lower pane displays any notes attached to each day. Using this view, the tasks are not viewable in the window.

The same controls exist to change the interval and size of the time blocks.

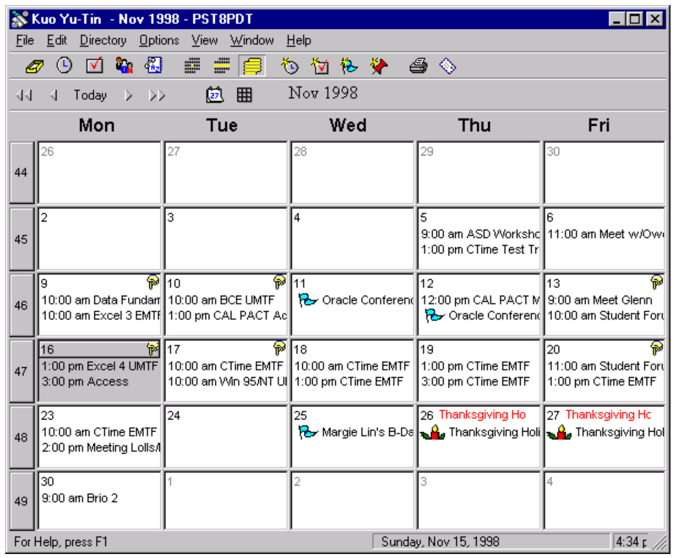
Tip ✓

Note that it is possible to have multiple agenda items at the same time. This will be displayed in multiple columns on the same day.



The Month View

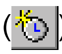
The month view will display an entire month with the associated agenda events and daily notes. Each day will display as many events or notes as possible. If more events or notes exist, the downward pointing hand will appear. The additional items can be viewed by selecting a visible item and using the down arrow on the keyboard. Like other views in Corporate Time, the grid can be readjusted by clicking and dragging when the mouse is on of the grid borders. To reset the grid, use the toolbar button ( ).



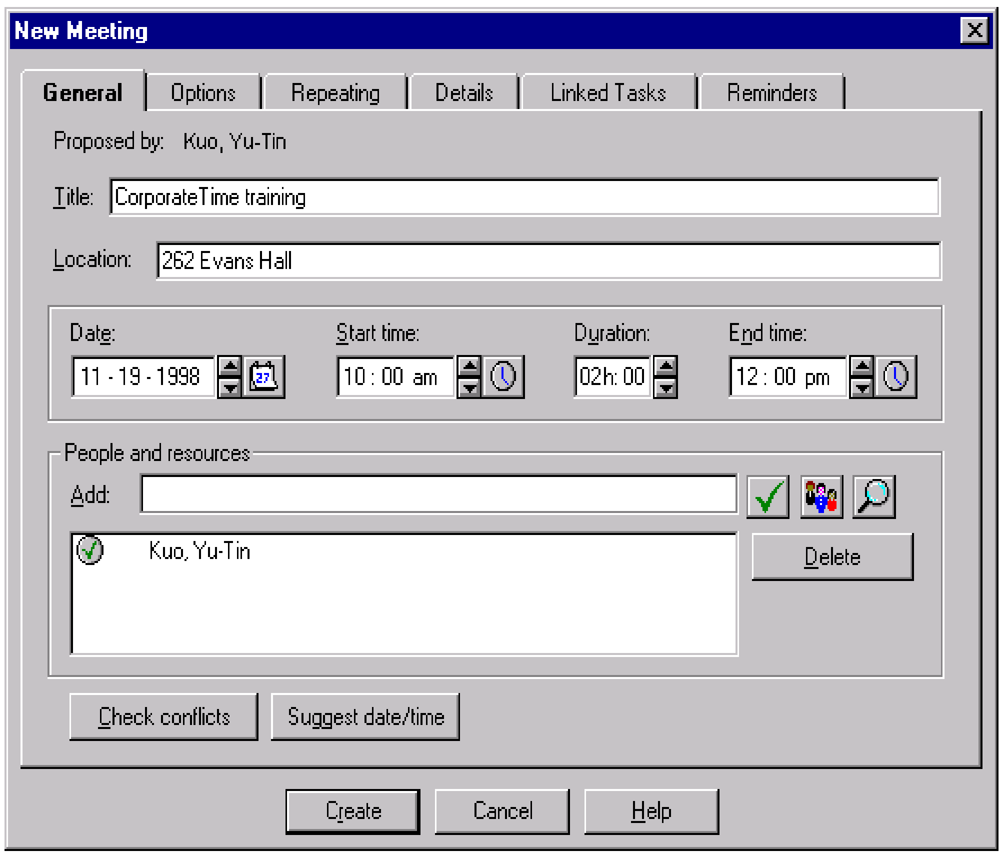
Quick Trick: Click on the date row and the day view for that day will automatically appear. To switch back to month view, use the toolbar button.

Scheduling Agenda Entries

CorporateTime offers a variety of methods to add agenda entries.

- Select **Edit|New|Meeting**.
- Click the New Meeting button in the toolbar ().
- Double click the time slot in the Day view or Week view.
- Select the block of time in the Day view or Week view, type the entry title, and hit enter. Double click on the entry after to edit settings.
- Double click an empty region for a date in the Month view.

Using any of the above methods, the entry dialog box will open on screen. This dialog box consists of six or seven window tabs on a PC or icon categories on a Mac depending on the method used to create the event.



The General Tab

In the general tab, enter the desired setting for each of the available fields. Some of the fields may already contain information depending on the method used to add the new entry.

Proposed by - This entry cannot be modified. It specifies you as the entry creator.

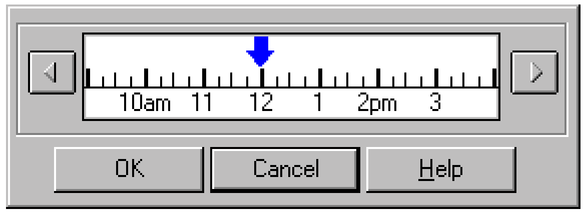
Title - This field defines the title for the entry

Location - This field defines the location for the entry.

Date - This field sets the date for the entry. Change the date by

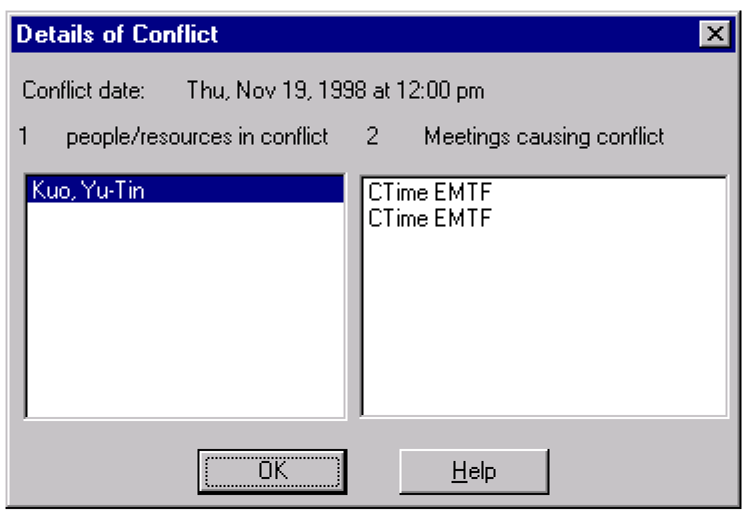
1. selecting a portion of the field and typing in the entry,
2. using the up and down arrows, or
3. using the date button ( ) to choose a date.

Start Time, Duration, End Time
These fields define the period for the agenda entry. A fun feature available for these fields is the time control button ( ). Click this button and a time control will appear on screen. Click and drag the blue arrow to automatically adjust the time for the field.



People and Resources - Invite people, resources, or groups to the agenda item. In the Add field, type in search criteria and click on the green check. The group listing and directory search buttons ( ) can also be used as an alternate method.

Check Conflicts - This button will check the current entry setting against your own schedule to look for conflicts. If a conflict is found, the conflicting entry will be displayed in a separate window.



Suggest a date/time - When a conflict is found, the last button in this tab will open a new dialog box on screen. In this window, set the desired preferences and click on the List suggestions button. CorporateTime will scan all agendas and suggest dates and times that match the criteria. If a suitable date and time is found, select the listing and click **OK**.

The Options Tab

Importance Level - This field sets the importance level for the entry. A special indication only appears in the agenda view if the color scheme is set to the importance level.

Access Level - This field sets the access levels for others who view the agenda entry.

Tentative Check Box - This check box will mark the entry as a tentative item. In the agenda view, the entry will appear in a separate color.

The Repeating Tab

This tab is used to automatically schedule the event in the future (i.e. standing meetings). Adjust the desired setting and click the **List Dates** button. CorporateTime will list all of the dates. The maximum number of dates is approximately **55**. If the time span is larger, CorporateTime will display a dialog box. The dialog box will always appear without listing any dates on a Mac, but will only appear on a PC if the Holiday checkbox is used. This may be a bug in the program.

The Details Tab

The Details tab is a useful area to include comments or a better description about the event. The description will be seen by all people who were invited to the event. In the lower portion of the window, an **Attach** button is available to attach documents (like a meeting agenda) with the event. This is similar to an attachment for e-mail. Only one attachment can be added per event, even if it is a repeating event. If a file has been attached, double click on the icon and the file will be opened. To remove the attachment, click the "Remove" button.

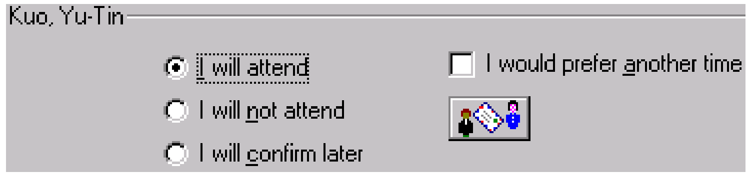
The Linked Tasks Tab

The Linked Tasks tabs allows you to schedule tasks which are linked to the current event. Click on the **New** button and the New Task dialog box will appear. This dialog box will be described in detail later. Any new tasks created in this area will appear in the normal task views available in CorporateTime. To delete a task, click on the **Delete** button. To keep the task, but unlink it to the event, click on the **Unlink** button.

The Reminder Tab

The Reminder tab is used to provide on-screen reminders for agenda events. Check the radio button to activate the reminder and choose the desired settings.

The Reply Tab



The Reply window is most commonly used when you are invited to an event. This window tab allows for confirmation of attendance to an event. Check off the desired options and close the window. The event status will be automatically updated in the agenda of the event creator. Notice that a checkbox is available if another time is preferred. This checkbox works independently of the other options. A button also exists for e-mailing the event participants. Click the button and a window will open on screen. Add any message desired and click **OK** to send the message.

Finalizing the Event

Note

You may choose to email all the event participants; however, a CalAgenda user may set her preferences to never receive email from Cal Agenda. If so, she will not receive the email you choose to send.

After adjusting all of the event settings, finalize the event by clicking on the **Create** button or **OK**. If other people were invited to the event, a dialog box will appear asking to mail the other invited participants. Choosing to mail the participants will send an actual e-mail to the other participants with the event details. This is a useful feature for participants who do not have the CorporateTime software in their office because they can receive information on the event. If an invited participant uses CorporateTime, an e-mail may not be necessary because they will automatically receive notification of the new event within the CorporateTime program.

Scheduling Day Events and Daily Notes

Day events are scheduled events which occupy the entire day or a large portion of the day. This event will not block out the time slots in the Agenda portion, instead it will appear in the notes section of the day view and the week view. Daily notes operate similarly to day events. Functionality wise, there is no difference between a day event and a daily note, they just appear with a different icon. The day event appears with a blue flag icon ( ) and the daily note appears with a red pushpin ( ). Logistically, a day event should refer to an event which will occupy most of the day; a daily note should refer to an event which must be accomplished sometime during the day, but it does not occupy the whole day.

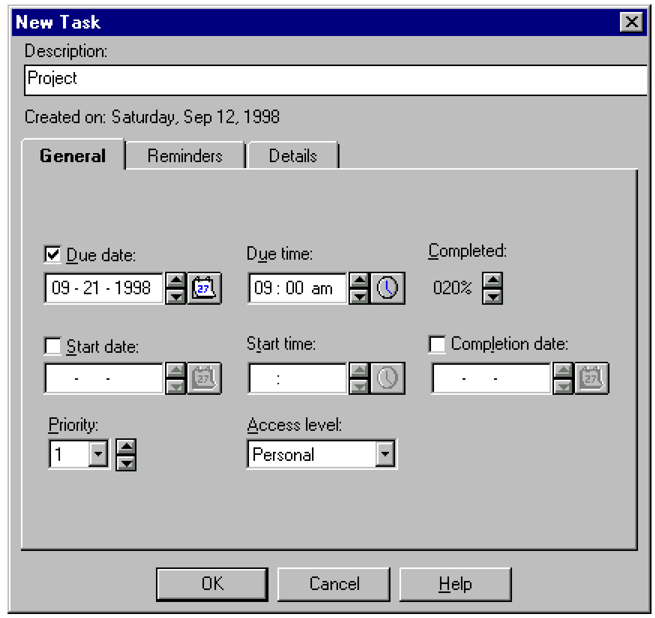
To schedule a day event or daily note, use the toolbar buttons: for a day event and for a daily note. An alternate method to create a daily note is to double click in the notes section of the day view and week view. In the dialog box that appears, set the desired setting for each window tab. The window tabs that appear are the same tabs which appear for scheduling a new event, but without the hours fields.

Scheduling New Tasks

Scheduling tasks can be done in a number of ways.

- Select **Edit|New|Task**.
- Click the **New Task** button in the toolbar ( ).
- Double click inside the task pane of the day view or the task view.
- Type a task name in the New window inside the task view and click the green check mark.

When the new task command is created a dialog box will appear containing three window tabs: **General**, **Reminders**, and **Details**. In the General tab, enter the task name and adjust the setting for the task. Notice that checkboxes exist for the due date, start date, and completion date. These fields can be used, but it is not necessary. The Reminders and Details tab operate similar to the tabs described earlier for events. Once everything has been set, click on **OK** and the new tasks will be created.



Tip

It is a good idea to use daily notes or events to inform your colleagues about being on vacation or away from the office. This will avoid having your events appear on their agenda.

Viewing and Editing Agenda Events

In any of the agenda views, the events will be displayed. In the day view and the week view, each event will be color coded, and display icons showing the status of the event. In the month view, only the event will be shown. To view the details on an event, double click the event and the event dialog box will appear. If you are the creator of the event, you will have the option of changing the event details. If the event was created by another person and you were invited, only the event details will be shown and you will not be allowed to edit the fields.

Alternate Methods of Editing Events

When using the day view or the week view, the title and time setting for an event can be changed without opening the event dialog box. Click on an existing event to select the time block and notice that the appearance of the event changes. A thick, dark line will appear at the top and bottom. Directly edit the title by clicking once more and typing. To increase or decrease the time span of the event, place the mouse on one of the event borders. The mouse pointer will change to double headed arrows ( ). Click and drag to increase or decrease the time span of the event. To move the entire event to a new time, place the mouse inside the time block. The mouse pointer will change to four headed arrows ( ). Click and drag to move the event block to another time. In the week view, the event can also be moved between the days of the week shown on screen.

When working with the month view, events can be moved to different days, but the time settings cannot be changed. Click and drag the desired event to different days to move it.

Duplicating or Rescheduling Events

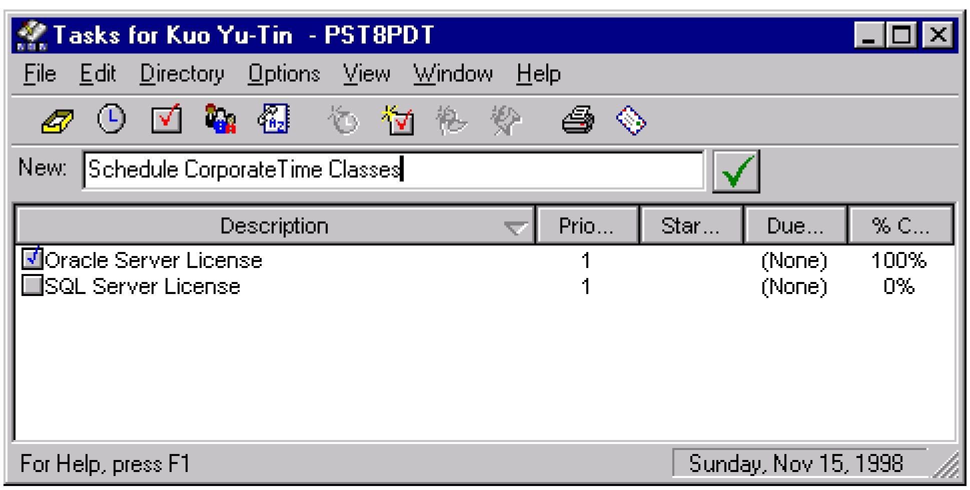
To duplicate or reschedule an event, highlight the event and select **Edit|Duplicate Meeting** or **Edit|Reschedule Meeting**. In the dialog box, make the necessary changes and click **OK**. CorporateTime will provide a warning if there is a conflict with the selected day/time.

Deleting Events

To delete an event, highlight the event and (1) press **Delete** or (2) select **Edit|Delete Meeting**.

Viewing and Editing Tasks

To view all of the scheduled tasks, select **File|Tasks|Open** or use the toolbar button ( ). Similar to opening an agenda, you may choose to open your own tasks or the tasks of another person. The task window that appears will display a listing of all the scheduled tasks along with the respective details. To make the listing easier to view, click once on a column header and the list will be sorted by that column.



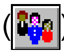
The In-Tray

The In-Tray is the primary source for managing entries received or sent out to other users. Open the In-Tray by selecting **File|Open In-Tray**, using the keyboard shortcut Control+I (PC) or Command+I (Mac), or by using the toolbar button ( ). The In-Tray window will appear with four folders for each user: New entries, Entries you've accepted, Entries you've sent out, and Entries you've refused. Click on a folder to open or close the folder.

When you have been invited to an event, the CalAgenda server will automatically notify you of this event in the New entries folder. By default, CorporateTime will check for new entries every fifteen minutes. To force any folder to refresh the entries, open and close the folder. Double click on any of the entries to view the details of the event or to open the fast reply screen. The desired action for the double click action can be set though the preferences (which will be discussed later). An alternate method to reply to events is to click and drag them from one folder to another. For example, to accept an invitation to a new event, click and drag the entry from the New Entries folder to the Entries you've accepted folder. CorporateTime will automatically adjust all of the necessary settings.

One quick way to view the participation status for an event is to click on the **icon** for the event ( ). The event listing will expand to show the participants and the associated status. A green check means the participant will attend; a red X means the participant will not attend; a blue question mark means that the participant has not replied. If any icon is accompanied by a gray circle with a red slash through it ( ), this means that the participant would prefer another time to meet.

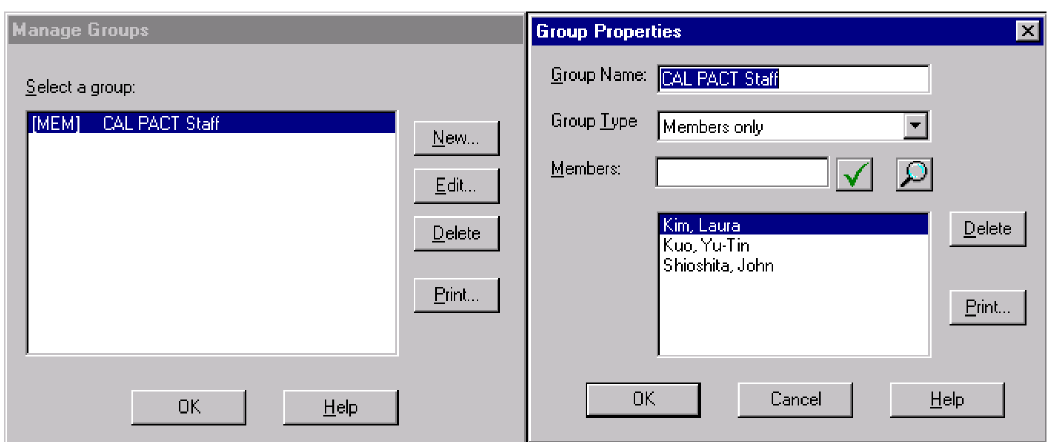
Creating and Managing Groups

Often times, events are scheduled with a recurring group of individuals. In these instances, it is a time consuming and inefficient process to search for each person when scheduling. CorporateTime has a feature to create groups of individuals and resources. When scheduling events, the group can be referenced instead of the individuals. This is usually accessed by the group icon () or by searching for the group. To create or to edit groups, select **Directory|Manage Groups**. Four types of groups exist:

- **Public Groups** - These groups are available to everyone on the system, but they can only be changed by the group owner.
- **Private Groups** - These groups are only available for the group owner.
- **Administrative Groups** - These groups are available to everyone on the system, but they can only be modified by the system administrator.
- **Members Only Groups** - These groups are available only to the members of the group.

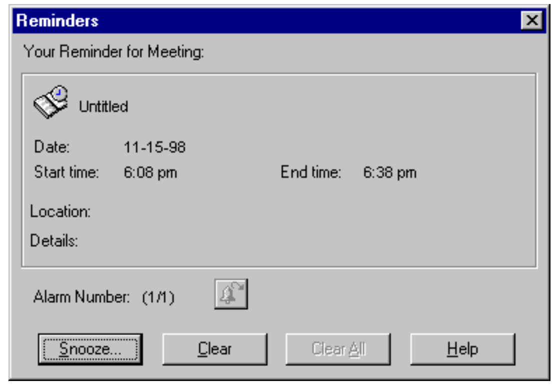
To create a group, click on the **New** button. Enter the group name and set the type of group this will be (you may be limited to creating only certain types of groups, e.g. Private and Members Only). Now add the group members using the standard CorporateTime search feature.

In the example below, the members only group “CAL PACT Staff” consists of three members. Once a group has been created, use the buttons to modify group settings.



Working with Reminders

Whenever a reminder has been set for an event, CorporateTime will open up the reminder window. An example of a pop-up reminder is shown here. It displays the details for the event with buttons at the bottom of the window.



Snooze - Click this button and a window will open to enter the amount of time the reminder will snooze for. After the set time has passed, the reminder window will reopen.

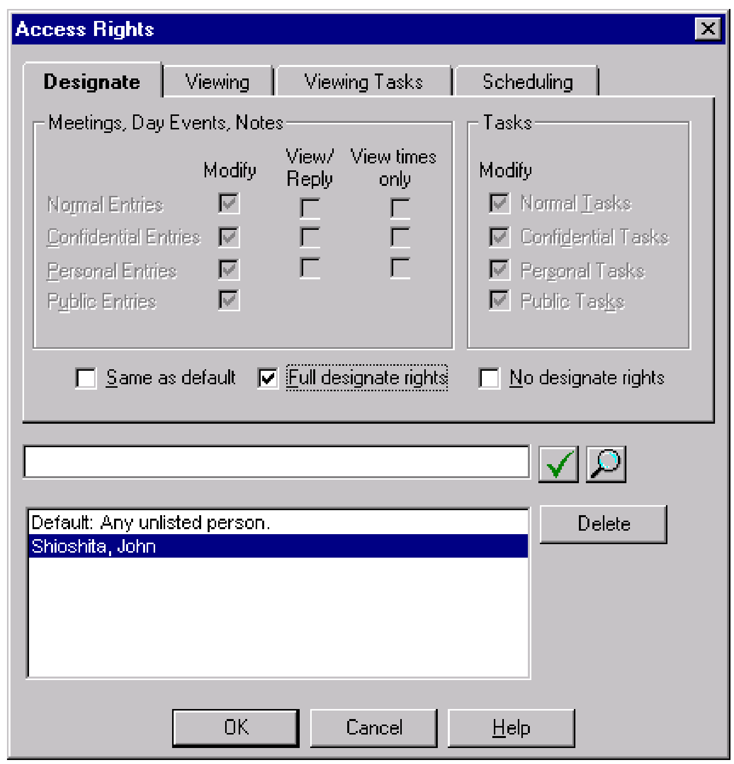
Clear - Click this button to clear the reminder message.

Clear All - Click this button if multiple reminder messages are on screen. All of the reminder windows will be closed.

Help - Click this button to open the help screen.

Setting Access Rights

Access rights are the privacy controls used when other users or a designate works with your schedule. Select **Options|Access Rights**. In the window there are four window tabs: **Designate**, **Viewing**, **Tasks**, and **Scheduling**. At the lower portion of the field is an area to add in additional users. Enter the name in the field and CorporateTime will find the user. To remove any user in the list, select the name and click on the **Delete** button.



To set the access privileges, highlight the user name in the list box at the bottom of the window. In the upper portions of the window, use the checkboxes to set the individual rights.

Setting User Preferences

All of the user preferences are found under the **Options** menu. Inside the menu, each category is defined with its associated preferences. Often when a preference is changed, you must exit and restart CorporateTime before the changes take effect.

Tip

To avoid having refused meetings appear on your agenda, make sure to turn off display of refused meetings in the agenda preference.

Agenda

In the Display tab of the agenda preferences, set the hours and days which are displayed. Use the Notification tab to adjust other preferences. One useful setting in the **Notification** tab is to set the time interval to check for new entries. The In-Tray of CorporateTime operates like checking mail in Eudora. If you are invited to an event, CorporateTime is not notified of the invitation until it checks for new events.

In-Tray

Use the In-Tray preferences to set the display option and the default action for double clicking on an event listing.

Scheduling

The preferences set in this area only apply when CorporateTime is asked to suggest another time for an event. The preference for each individual day can be adjusted. To simplify things, after one day has been set, click the **Apply to All** button to apply the current setting to every day.

Entry Defaults

The preferences set in this area are used to control the default values whenever an agenda event, task, day event, or daily note is created. These setting only affect the default value that appears. You can still adjust any of the values while creating the entry.

General

The General preferences are used to adjust the formats for names and dates along with the mail client used for e-mail and the time zone.

Tip

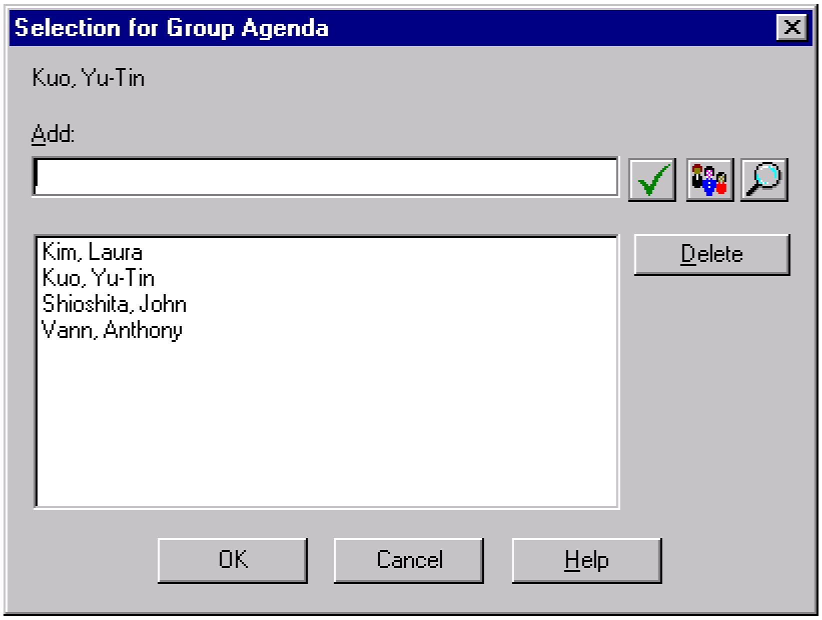
Checkout CalAgenda's website, located at http://calagenda.berkeley.edu, for more information about synchronizing with palmtops and PDAs.

Off-Line

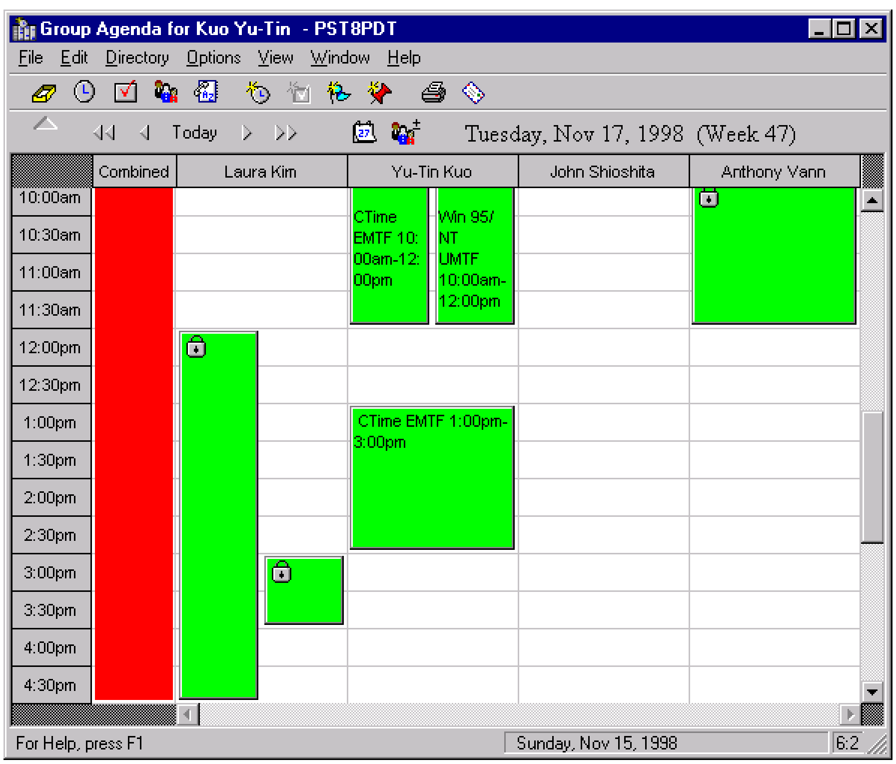
The Off-line preferences are set for those users who will use CorporateTime away from a network connection. The settings inside are used to specify the amount of the information that should be uploaded and downloaded.

Group Agendas

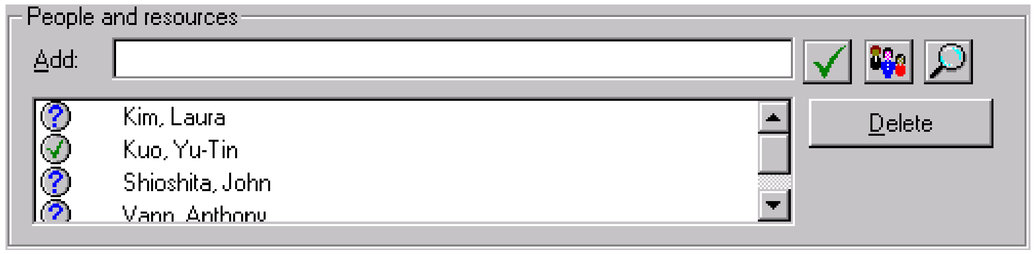
To open a group agenda, select **File|Agenda|Open Group View** and the following dialog box will appear.



Enter in all of the people or resources to view and click on **OK** to open the group agenda. The group agenda is a display of each individual schedule along with a combined view of all of the individual schedules.



Along the left side of the window is the combined view. If any individual or resource is not available, the time block will be marked off in red. To schedule an event with all the individuals and/or resources in the group agenda, click and drag on the time blocks in the “Combined” column and start a new entry as described previously. Each person will automatically be added in the General tab of the entry details as shown below.



To schedule with one person, select the time blocks for the individual and start a new entry. It is not possible to automatically schedule with a subset of the individuals or resources shown. If you are viewing a group agenda for 5 people and you would like to schedule a meeting with only 4 of them, start a new entry and modify the General tab of the entry details manually.

To change the individuals or resources shown in the group agenda, use the toolbar button ( ). This will display the selections for the group agenda. Modify the listing and click OK to display the new selections.

CalAgenda Website

You can also access your CalAgenda account through the web at:

http://calagenda.berkeley.edu

The website offers most of the functionality of the CorporateTime software such as making new events, checking your schedule, and the schedule of other people, resources, or groups. The CalAgenda website also supplies information on how to transfer your schedule to a PDA. If you have any problems or questions about CalAgenda, please be sure to check with your departmental technical support for assistance.